#### Alaska Department of Revenue

# **Permanent Fund Dividend Program**

### Information & Instructions

(Application forms not included)

### **Annual Dividend Calendar**

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# Applications...

**Filed Online** must be received by the PFD Division no later than 11:59 p.m., March 31, Alaska Standard Time (AST). The website will shut down at 12:00 a.m. April 1st. Applications in progress at cutoff will not be accepted. You must have received a confirmation number to have successfully filed online. **Hand Delivered** or sent by courier service must be received at a PFD Office by 4:30 p.m., March 31st. A receipt will be issued upon request. **Mailed** by USPS or a foreign mail service must be postmarked on or before March 31st. **Filed after the deadline** will be denied.

# Available to the public 10 a.m. to 4:30 p.m. Monday – Friday

**Anchorage Office** (907) 269-0370

Alaska Department of Revenue Permanent Fund Dividend Division 550 W. 7th Avenue, Ste 100 Anchorage, AK 99501

Fraud Hotline
Juneau Hotline (907) 465-2654
Anchorage Hotline (907) 269-0385

**Fairbanks Office** (907) 451-2820

Alaska Department of Revenue Permanent Fund Dividend Division 1005 Cushman Street Fairbanks, AK 99701

Report Fraud by Mail
PFD Criminal Investigations Unit
PO Box 110466
Juneau. AK 99811-0466

Juneau Office (907) 465-2326

Alaska Department of Revenue Permanent Fund Dividend Division PO Box 110461 Juneau, AK 99811-0461

Report Fraud by Email dor.pfd.fraud@alaska.gov

Toll Free Recorded Information Line: 1 (800) 733-8813

Visit our website www.pfd.alaska.gov Email us dor.pfd.info@alaska.gov

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# **Frequently Asked Questions**

Each individual must complete a separate application.

## Am I eligible for a current year Permanent Fund Dividend?

Did you...

- Establish Residency ties in Alaska *prior to January 1st of the qualifying year? (Took one step beyond physical presence)*
- Maintain Alaska residency through the date you will submit your PFD application?
- Do you intend to remain an Alaska resident indefinitely?
   \*If you answered "NO" to any of these questions, you are not eligible for a current year dividend.

### This is the first year I am applying for a PFD. What should I do?

Review the general eligibility requirements above and if you believe you qualify:

- Complete an online application at <a href="www.pfd.alaska.gov">www.pfd.alaska.gov</a> OR
- Complete a paper application AND an Adult Supplemental Schedule and submit them by March 31st.
- Submit an original certified birth certificate, original passport, or naturalization papers (photocopies or hospital certificates will not be accepted).

## Can I apply online as a first time applicant?

YES! First time applicants need to sign using a mail-in signature page.

## Do I need to be a registered voter in Alaska to receive a PFD?

No, voter registration in Alaska is not required to receive a PFD.

# What is a signature page?

If you choose to apply online without using an electronic signature, you will be prompted to print a signature page at the successful completion of the online application process. It is your written certification that the information provided on your online application is accurate and true. Print and sign the signature page, and mail it to the PFD Division to complete your online application.

# What is an electronic signature (e-sign)?

A signature created electronically through myAlaska that allows you to certify the information on your online application without submitting a signature page.

# What do I need to e-sign my application? (electronically sign)

Every adult (18 years+) who wants to apply online and e-sign his/her PFD application, or a child's application that he/she will sponsor, needs a **myAlaska account**. (Minors cannot establish a myAlaska account.) You will need your most **current Alaska driver's license or Alaska ID** to register for a myAlaska account at <a href="https://myAlaska.state.ak.us">https://myAlaska.state.ak.us</a>.

# Who can e-sign? (electronically sign)

Any adult who received a dividend previously and has an Alaska driver's license or ID card can e-sign. Adult sponsors electronically sign for children they sponsor.

# Can I use last year's myAlaska account?

If you previously created a myAlaska account, you should use the same account. If your name, address or email address changed since you created your account, update the information in your myAlaska profile at <a href="https://myAlaska.state.ak.us">https://myAlaska.state.ak.us</a> before applying for the dividend.

### What if I forgot my myAlaska username?

Go to <a href="https://myAlaska.state.ak.us">https://myAlaska.state.ak.us</a> and click on "Forgot Username." You will be prompted to provide your email address from last year. Your username will be emailed to that email address. If you do not have the same email address as last year, you will need to create a new myAlaska account.

## What if I forgot my myAlaska password?

If you know your username, go to <a href="https://myAlaska.state.ak.us">https://myAlaska.state.ak.us</a> and click on "Forgot Password." You will be prompted to provide your username and answer your secret question. You can then set a new password.

### What if I forgot both my myAlaska username & password?

You will need to create a new myAlaska account. myAlaska will recognize you and provide you with the username you had created previously but forgotten. At which time, you will be prompted to update your password.

### How do I know if I successfully applied online?

You will know you have successfully applied online when you see the "Congratulations" page with your PFD Confirmation Number. You will get a separate confirmation number for each application you file. You will also receive an email confirmation if you provided an email address.

### How do I apply online if I don't have a computer or a printer?

Public access computers are available at all PFD locations. Public access computers are also available at most Legislative Information Offices and public libraries.

# How do I check my application status?

You can check the status of your application at <a href="www.pfd.alaska.gov">www.pfd.alaska.gov</a>. Click



# What constitutes proof of filing?

If you apply online, your printed "Congratulations" page containing your PFD Confirmation Number serves as proof that the PFD Division received your application. If you mail your application, a USPS certified mail receipt, a USPS delivery confirmation receipt, or a Fed-EX, DHL or UPS delivery receipt will serve as proof of filing. If you hand-deliver your application, the Dividend Office will provide a receipt upon request.

# Can my dividend be taxed or garnisheed?

Dividends are taxable and can be garnisheed. For tax purposes, your dividend check stub is your Form 1099-MISC (miscellaneous income). Consult the IRS or other qualified person if you have questions about reporting dividend income. PFD staff cannot advise you about tax matters. The PFD Division is required by law to garnishee a dividend if a legal request is properly filed. If you dispute a deduction, you must contact the agency claiming the deduction. The PFD Division cannot resolve disputes. For detailed deduction information, visit our website and click "My PFD Info".

# Is my information kept confidential?

Under state law, all information provided is confidential except the applicant's name and eligibility determination.

# Why is it important to keep my address current?

An incorrect address can delay payment of your dividend. Address changes must be requested in writing and signed. Forms are available online at <a href="https://www.pfd.alaska.gov">www.pfd.alaska.gov</a> or at any PFD location.



# Access your information at <a href="https://www.pfd.alaska.gov">www.pfd.alaska.gov</a>

# Verify the division received your application

Viewing an application submitted by paper may take up to 6 weeks Viewing an application submitted online may take up to 48 hours

Verify the accuracy of your information

Check your eligibility status

Find your eligibility technician's contact information

View records for applications you sponsored

View your payment history

View deductions

It's important to check your eligibility status periodically, as your status can change. The Permanent Fund Dividend Division works in cooperation with many other agencies through our regular process and questions can arise that may require action on your part. Incorrect address, or Social Security mismatch are examples of issues that may cause delay to dividend payment. By checking your status and providing information when needed, you can help ensure that you receive your dividend timely.

Visit often for new services offered online as well as helpful information.

# **Direct Deposit Instructions**

Answer **YES** to question 7 (online or paper applications) and provide the two-digit code from the list below that identifies your bank (not the bank routing number). Select the account type (checking or savings).

Direct Deposit is available only at the financial institutions listed below.

#### **Bank & Credit Union Codes**

Cod	e Name	Cod	e Name
CF	Advancial FCU Alaska Airlines Employees FCU Alaska District Engineers FCU Alaska Pacific Bank Alaska USA FCU ALPS FCU	BO	First National Bank Alaska
C7		BR	Key Bank of Alaska
CA		CS	Matanuska Valley FCU
BB		CP	MAC FCU
CD		BT	Mt. McKinley Bank
C3		CX	Northern Skies FCU
CH	City of Fairbanks FCU Credit Union 1 Denali Alaskan FCU Denali State Bank First Bank	BY	Northrim Bank
CQ		CW	Spirit of Alaska FCU
CG		CZ	Tongass FCU
BJ		CC	True North FCU
BM		BU	Wells Fargo

# **Providing your Account Number**

Enter your account number starting at the left side of the Account Number box. You may use dashes in the account number if appropriate. **Do not include the routing number.** For example, if your account number is 123-4567890, enter your account as:

If you have questions about your account type or account number, please contact your financial institution.

**Direct deposit rules vary by financial institution!** If you intend to request direct deposit to an account that does not carry your name, check the financial institution's policy. Settlement of payments that have been rejected by the financial institution can be delayed 30 days or more.

### Absence Guidelines

This document is intended to cover the most common circumstances related to absences as they pertain to the PFD program. Eligibility is referenced only in the context of an absence from Alaska - other requirements of the PFD program must be met to be otherwise eligible. Refer to PFD Statutes and Regulations for more detailed information or contact your nearest PFD office to get more specific information. See AS 43.23.008 and 15 AAC 23.163 for detailed information.

#### **General Rules**

You may be absent from Alaska in a calendar year for up to 180 days for any reason and still be eligible for a dividend, as long as you meet all other requirements of the program. For certain absences, you may still be eligible for a dividend even though you are absent from Alaska for more than 180 days. These absences are referred to as "allowable absences" and are described under the Allowable Absences section below.

To remain eligible for this program while you are absent, whether one day or the whole year, you must maintain your Alaska residency and intend to return to Alaska to remain indefinitely. If you do anything to establish residency in another state or country while you are out of Alaska, such as registering to vote or filing a resident income tax return, you will not be considered a resident of Alaska for purposes of this program.

REPORTING ABSENCES IS MANDATORY if you are absent from Alaska for a total of 90 days or more during the calendar year, or if you are absent when you file your application. Failure to report absences can trigger an investigation and may cause denial of your application. For purposes of the dividend program, absences are counted in cumulative days, not consecutive days, in a calendar year. The division counts the day you leave as a day in Alaska; the day you return is counted as an absence day. In other words, the day you return is counted as a day absent, the day you left is not.

### Allowable Absences

Permanent Fund Dividend laws allow persons to be absent from Alaska for more than 180 days total in a qualifying year if they are absent for one or more of the following reasons, providing that they maintain their Alaska residency and do not establish residency elsewhere:

- 1. receiving secondary or postsecondary education on a full-time basis;
- 2. receiving vocational, professional, or other specific education on a full-time basis for which, as determined by the Alaska Commission on Postsecondary Education, a comparable program is not reasonably available in the state;
- 3. serving as an active duty member of the armed forces of the United States or accompanying, as that individual's spouse, minor dependent, disabled dependent, an individual who is
  - A. serving as an active duty member of the armed forces of the United States; and
  - B. eligible for a current year dividend.
- 4. serving under foreign or coastal articles of employment aboard an oceangoing vessel of the U.S. merchant marine;
- 5. receiving continuous medical treatment recommended by a licensed physician or convalescing as recommended by the physician that treated the illness if the treatment or convalescence is not based on a need for climatic change;
- 6. providing care for your parent, spouse, sibling, child, or stepchild with a critical life-threatening illness whose treatment plan as recommended by the attending physician, requires travel outside the state for treatment at a medical specialty complex;
- 7. providing care for your terminally ill family member;
- 8. settling the estate of your deceased parent, spouse, sibling, child or stepchild provided the absence does not exceed 220 cumulative days;
- 9. serving as a member of the United States Congress;
- 10. serving on the staff of a member from this state of the United States Congress;
- 11. serving as an employee of the state in a field office or other location;
- 12. accompanying a minor who is absent under reason (5) above;
- 13. accompanying another eligible resident who is absent for reasons (1), (2), (5)-(12) as the spouse, minor dependent, or disabled dependent of the eligible resident;
- 14. serving as a volunteer in the federal peace corps program.
- 15. training or competing as a member of the United States Olympic Team.
- 16. Participating for educational purposes in a student fellowship sponsored by the United States Dept. of Education or by the United States Department of State;
- 17. For any reason consistent with the individual's intent to remain a state resident, provided the absence or cumulative absences do not exceed....(see AS 43.23.008 (17) (A),(B),(C) for specific limits of number of days)

#### 72-Hour Rule

All persons claiming allowable absences must be physically present in Alaska for at least 72 consecutive hours at some time during the two prior years to the current dividend year.

The commissioner of the Department of Revenue may waive this rule for military members, their spouse and dependents during times of national emergency. If applicable, contact the Permanent Fund Dividend Division to see if there is a waiver in effect for the dividend year you are applying for.

#### **Five Year Rule**

If you have been claiming an allowable absence for more than five years, it is presumed that you do not have the requisite intent to return. To remain eligible, you will need to overcome that presumption and show indicators of your intent to return to Alaska to remain indefinitely. Generally, you will need to spend at least 30 cumulative days in Alaska during the past five years. The department will consider your ties to Alaska, your opportunities to return as compared to your return history, circumstances that may have prevented your return, and your length of residency as compared to your length of absence.

#### Ten Year Rule

You will not be eligible for a dividend if you have been claiming allowable absences for the 10 preceding years and continue to be absent greater than 180 days in the qualifying year. This rule does not apply if you are a member of the U.S. Congress or serving on the staff of an Alaska member of the U.S. Congress or if you are accompanying the eligible member as the member's spouse, minor dependents or disabled dependent.

#### Absences in addition to Allowable Absences

If you were absent for more than 180 total days in a calendar year including one or more allowable absences during the year, you have a limited number of days that you may be absent for other reasons in order to remain eligible for the dividend. There are different rules that apply to the total number of days allowable depending on the circumstances.

# **Military Members and Family**

If you are active duty in the armed services, you and your family (spouse, minor dependent and disabled dependent) can be absent an additional 180 days if you are only claiming your active duty service time as an allowable absence. If you claim other allowable absences ( <u>AS 43.23.008</u> ), your additional days will be limited as follows:

- If claiming an absence as a full-time student in addition to your active duty service time, you are limited to 120 additional days.
- If claiming any other allowable absence in addition to your active duty service time, you are limited to 45 additional days.

#### **Students**

If you are a full-time student in good standing, you and your family (spouse, minor dependent and disabled dependent) can be absent 120 days in addition to your education as long as you are only claiming your student absence as an allowable absence. If you claim other allowable absences, your additional days will be limited to 45 days.

# Medical, Family Care & Other Absences

If you are not a military member or student, and you are claiming an allowable absence of more than 180 days, you are limited to 45 additional days for any reason, regardless of the circumstances.



# **Alaska's Charitable Contributions Program**

#### FREQUENTLY ASKED QUESTIONS

### What is the PFD Charitable Contributions Program?

Alaskans applying for their PFD (on-line only) can donate all or part of it to the campuses of the University of Alaska, community foundations, and eligible charitable and educational organizations. Applicants can choose to contribute to one or more organizations, anywhere from \$25 to the entire amount of the dividend.

## Where can I preview a list of eligible organizations?

A list of eligible organizations can be found at www.pick.click.give.org

### What if my favorite organization is not listed?

You will need to make your donation directly to an organization that is not listed in the PFD online application.

## Can I give part of my child's PFD?

Yes, each person who files online has a choice of eligible non-profits to which they can give.

#### Are donations tax deductible?

Yes, donations are tax deductible. All eligible organizations are registered with the IRS as a 501c3 non-profit organization.

# Will my name and contact information be given to organizations I donate to?

You will have the ability, when making your donation, to check a box that authorizes the state to send your name, contact information and the amount you give to the organization. You can remain anonymous by not selecting the option to disclose your information. Organizations prefer to know who has contributed so that they can share information with you about how the donations have been used and to recognize you for your generous support.

# When will the organization receive my donation?

Your donation will be paid to the organization at the same time dividends are distributed in October.

# Can I change or withdraw my donation?

Yes, you can add to, withdraw, or change your donations either online using the divisions website at <a href="https://www.pfd.alaska.gov">www.pfd.alaska.gov</a> or by written request to the division. Changes must be made prior to dividend payment lockdown in late September.



